



Enzo Unified – Adapter User Guide

Sales Force

Version 1.6 – RTM

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Pre-Requisites

In order to successfully install any adapter you must install Enzo Unified first. The installation wizard allows you to select the adapter(s) you want to install. You will also need to have an active subscription with Salesforce allowing access to the Salesforce APIs, either as a production system or a sandbox environment.

Configure the Salesforce Adapter with Enzo Manager

Introduction

This adapter provides access to Salesforce and allows you to perform the following functions:

- Query Salesforce objects (table structures, data)
- Change Salesforce data
- Locally cache Salesforce data with automatic refresh

Configuration

Configuring the adapter to communicate with Salesforce can be done using SQL commands or through Enzo Manager. The following configuration settings are required to communicate with a Salesforce subscription:

Parameter Name	Type	Comment
UserId	string	A Salesforce user id with enough rights to read/write data, and authorized to make API calls
Password	string	Password for the Salesforce user
authToken	string	The authToken for the user; this token is provided by Salesforce and sent to the registered administrator. If not known, the password must be changed inside Salesforce and another email will be sent with the corresponding authToken
useSandbox	bool	When true/checked, indicates that Enzo should connect to the Salesforce sandbox

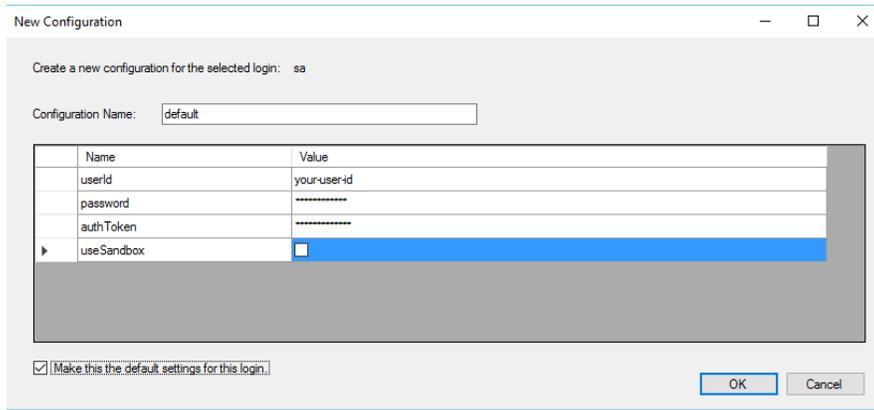
To configure the adapter using a SQL command, follow these steps:

- Open SQL Server Management Studio (SSMS)
- Connect to Enzo Unified using the 'sa' account
 - o If Enzo Unified is running on the same machine and was installed with the default settings, the Server name is: localhost,9550
- Run this command to configure the adapter (the last parameter should be 1 if connecting to a Salesforce sandbox):

```
EXEC Salesforce._configCreate 'default', 1, 'userid', 'password', 'authToken', 0
```

You can also use Enzo Manager to configure your adapter. Enzo Manager (EnzoManager.exe) is found in the **EnzoUnifiedSvc** directory where Enzo Unified is installed. To use Enzo Manager, follow these steps:

- Start Enzo Manager
- Login to Enzo Unified using the 'sa' account
 - o If Enzo Unified is running on the same machine and was installed with the default settings, the Server name is: localhost,9550
- Click on the Salesforce adapter in the list of adapters
- Click on New Config
- Enter your Salesforce settings
 - o Make sure to check the "Make this the default settings"



- Click OK

Commands Overview

Once configured, you can use SSMS to interact with your Salesforce account. The following represents a subset of the available commands available. To view all available commands, run this command:

EXEC Salesforce.help

Each operation can accept a number of parameters; to obtain further details on the available parameters for the GetSFMetadata command, run this SQL:

EXEC Salesforce. GetSFMetadata help

Operation	SQL Command
Query a Table	EXEC bsc.SalesForce.Query 'account'
List Salesforce objects	EXEC bsc.SalesForce.GetSFObjects
List Salesforce object fields	EXEC bsc.SalesForce.GetSFMetadata 'account'
List updated Salesforce records	EXEC bsc.SalesForce.GetSFUpdatedObjects 'account'
List deleted Salesforce records	EXEC bsc.SalesForce.GetSFDeletedObjects 'account'

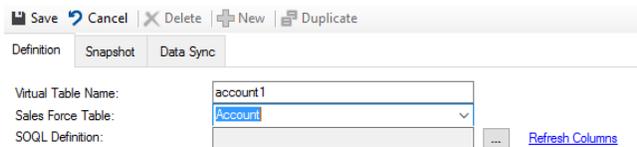
Virtual Tables

This adapter allows you to create Virtual Tables to simplify Salesforce queries. Virtual Tables are also the basis for enabling local cache of Salesforce data, and for data synchronization between a Salesforce object and a remote object (such as a SQL Server table, or a SharePoint list).

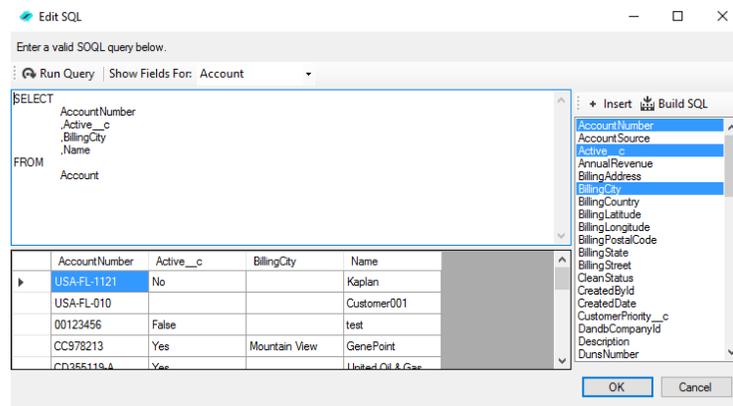
You can create Virtual Tables using Enzo Manager, or by using SQL commands. The following gives you information on how to create a Virtual Table using Enzo Manager; for information on how to use SQL commands, contact Enzo support:

- Start Enzo Manager
- Login to Enzo Unified using the 'sa' account

- If Enzo Unified is running on the same machine and was installed with the default settings, the Server name is: localhost,9550
- Click on the Salesforce adapter in the list of adapters
- Click on the Virtual Tables tab
- Click on New
- Enter the following information:
 - Virtual Table name: the name for your virtual table
 - Salesforce table name: the name of the Salesforce object (such as Account); a dropdown is available to choose from



- SOQL definition: click on the ellipses to enter the SOQL (...)
 - The list of columns for the selected table is automatically provided
 - You can either type a valid SOQL or select the fields you want on the right and click on Build SQL
 - Click on RunQuery to try the command



AccountNumber	Active__c	BillingCity	Name
USA-FL-1121	No		Kaplan
USA-FL-010			Customer001
00123456	False		test
CC978213	Yes	Mountain View	GenePoint
CD35519A	Yes		United Oil & Gas

- Click OK when ready
- Click Save to create the Virtual Table

Once the Virtual Table has been created, you can query it immediately through SSMS. Run the following command (assuming the name of the Virtual Table is 'account1')

```
SELECT * FROM bsc.SalesForce.Account1
```

```
SELECT * FROM bsc.SalesForce.Account1 WHERE Name like 'a%'
```

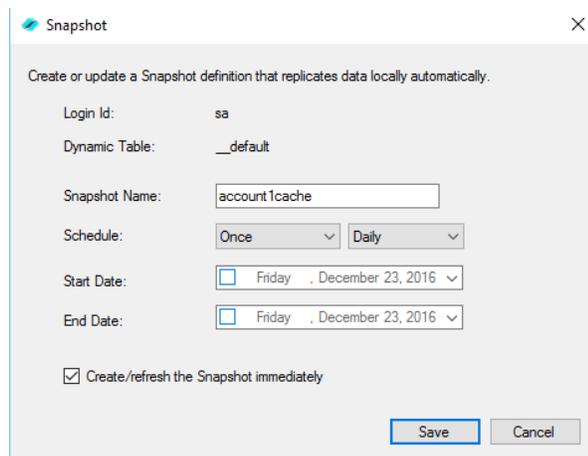
You can also execute DELETE, UPDATE and INSERT operations on a virtual table to modify Salesforce data.

NOTE: It is possible to update or delete a Virtual Table; however changes take effect upon restart of Enzo Unified.

Shapsnot

Once a virtual table has been created, you can use it to create a local cache of Salesforce data (called a Snapshot), with automatic refresh. The snapshot can be created using Enzo Manager or an SQL command; the following shows how to use Enzo Manager.

- Start Enzo Manager
- Login to Enzo Unified using the 'sa' account
 - o If Enzo Unified is running on the same machine and was installed with the default settings, the Server name is: localhost,9550
- Click on the Salesforce adapter in the list of adapters
- Click on the Virtual Tables tab
- Select a virtual table you want to cache locally
- Click on the Snapshot tab
- Click New
- Enter the following information:
 - o Name of the Snapshot
 - o A schedule (this can be daily, weekly, monthly, yearly, or using a Cron job)
 - o Start/End dates for the refresh operations (optional)
 - o Create Snapshot Immediately (check this box to create the snapshot now)



- Click Save

Data Synchronization

This section is under construction. Contact Enzo Unified Support for assistance.